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Men's Furnishings and Work Wear

FACT FILE

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**Market Research Division
Fairchild Publications, New York**

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**Men's Furnishings
and Work Wear**

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E.B. Gold, Manager
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MEN'S FURNISHINGS

Market Trends

Despite the current inflationary pressures on the U.S. consumer to limit his apparel expenditures, sales of men's furnishings appear to be holding up well. In fact, many of these items are enjoying increased, rather than decreased, sales. The prevailing logic behind this apparent trend is that men prefer to buy shirts, neckwear and other furnishings items to add new sparkle to their existing wardrobes in lieu of buying big ticket items such as sport coats and suits.

For this reason, style and color are becoming more important to men in their selection of furnishings. A prime example of this is in dress shirts, where one estimate has sales of striped dress shirts in 1981 falling to about 60% of patterned purchases with the balance made up by fabrics that were considered "sportswear" not too long ago, such as lively checks and plaids. The practicality and economy of combined dress/sport shirts has also given rise to colors new to the dress shirt industry.

Consumers are also demanding quality with a guarantee of long-life from the furnishings they buy. Retailers are reporting more sales at higher price points beyond mere inflationary increases. In addition, goods made from all-natural fibers such as cotton for shirts, underwear and nightwear and silks and wools for neckwear, are enjoying moderate sales success.

Not only does the term furnishings cover a very diversified group of products—ranging from neckwear to underwear, but merchandising practices and definitions vary from store to store, with some items considered as sportswear or accessories.

Information on sport shirts is covered in this Fact File only where data is combined with dress shirts. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear, Jeans and Active Wear Fact File. Analyses of recent trends in the hosiery industry (both men's and women's) is part of the Bodywear and Legwear/Hosiery Fact File. Accessories (jewelry, small leather goods, etc.), often included in men's furnishings are not covered in detail in this Fact File, but are covered in the Fashion Accessories (Men's and Women's) Fact File.

AT THE MANUFACTURER LEVEL

The latest detailed information on manufacturers classified in the men's furnishings industry is contained in the recently released 1977 Census of Manufactures reports issued by the U.S. Census Bureau. This is the first complete census conducted since 1972.

According to the census, there were 667 companies with 928 plants in the men's and boys' shirt and nightwear industry in 1977. The value of shipments (including goods not classified in this industry and miscellaneous receipts) from these plants was \$2.9 billion, a 39.5% increase over the 1972 shipment value. Value added by manufacture was, at \$1.4 billion, 44.0% higher than in 1972.

With the exception of men's and boys' neckwear, every industry group classified in the men's furnishings industry gained over 1972 both in value of shipments and value added by manufacture.

GENERAL STATISTICS ON THE INDUSTRY

Dress Shirt and Nightwear Industry (SIC 2321*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	667	516	+ 29.3%
Number of establishments, total**	928	731	+ 26.9
Number with 20 or more employees	679	564	+ 20.4
Employees, total (thous.)	114.7	113.4	+ 1.1
Production workers (thous.)	103.0	102.0	+ 1.0
Payroll (mil. \$)	\$ 711.3	\$ 514.9	+ 38.1
Value added by manufacture# (mil. \$)	\$1,445.7	\$1,003.8	+ 44.0
Value of shipments## (mil. \$)	\$2,934.6	\$2,104.3	+ 39.5
Capital expenditures, new (mil. \$)	\$ 25.9	\$ 24.1	+ 7.5

Underwear (SIC 2322*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	56	67	- 16.4%
Number of establishments, total**	76	94	- 19.1
Number with 20 or more employees	59	73	- 19.2
Employees, total (thous.)	15.1	16.0	- 5.6
Production workers (thous.)	13.7	15.1	- 9.3
Payroll (mil. \$)	\$ 92.2	\$ 68.6	+ 34.4
Value added by manufacture# (mil. \$)	\$218.2	\$130.9	+ 66.7
Value of shipments## (mil. \$)	\$419.8	\$239.3	+ 75.4
Capital expenditures, new (mil.\$)	\$ 2.6	\$ 5.7	- 54.4

Neckwear (SIC 2323*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	199	291	- 31.6%
Number of establishments, total**	207	299	- 30.8
Number with 20 or more employees	81	135	- 40.0
Employees, total (thous.)	6.3	11.1	- 43.2
Production workers (thous.)	5.1	8.8	- 42.0
Payroll (mil. \$)	\$ 57.5	\$ 70.0	- 17.9
Value added by manufacture# (mil. \$)	\$117.5	\$143.4	- 18.1
Value of shipments## (mil. \$)	\$223.8	\$294.9	- 24.1
Capital expenditures, new (mil. \$)	\$ 2.6	\$ 4.0	- 35.0

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Hats and Caps (SIC 2352*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	230	253	- 9.1%
Number of establishments, total**	258	280	- 7.9
Number with 20 or more employees	122	122	--
Employees, total (thous.)	12.4	11.3	+ 9.7
Production workers (thous.)	11.1	10.0	+ 11.0
Payroll (mil. \$)	\$ 85.1	\$ 55.6	+ 53.1
Value added by manufacture# (mil. \$)	\$152.7	\$100.2	+ 52.4
Value of shipments## (mil. \$)	\$284.8	\$171.0	+ 66.5
Capital expenditures, new (mil. \$)	\$ 3.9	\$ 1.9	+105.3

Hosiery, n.e.c. (Primarily Men's) (SIC 2252*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	382	375	+ 1.9%
Number of establishments, total**	415	415	--
Number with 20 or more employees	257	269	- 4.5
Employees, total (thous.)	32.2	32.6	- 1.2
Production workers (thous.)	29.0	29.3	- 1.0
Payroll (mil. \$)	\$218.7	\$159.7	+ 36.9
Value added by manufacture# (mil. \$)	\$401.5	\$295.2	+ 36.0
Value of shipments## (mil. \$)	\$921.3	\$600.6	+ 53.4
Capital expenditures, new (mil. \$)	\$ 14.8	\$ 12.5	+ 18.4

Knit Underwear Mills (SIC 2254*)

	<u>1977</u>	<u>1972</u>	<u>% Change 1977/1972</u>
Number of companies	80	74	+ 8.1%
Number of establishments, total**	92	87	+ 5.7
Number with 20 or more employees	74	74	--
Employees, total (thous.)	25.2	26.0	- 3.1
Production workers (thous.)	23.4	23.8	- 1.7
Payroll (mil. \$)	\$175.2	\$134.6	+ 30.2
Value added by manufacture# (mil. \$)	\$305.7	\$251.5	+ 21.5
Value of shipments## (mil. \$)	\$648.9	\$544.6	+ 19.1
Capital expenditures, new (mil. \$)	\$ 14.5	\$ 7.0	+107.1

(continued—footnotes following)

GENERAL STATISTICS ON THE INDUSTRY

n.e.c. = not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2321 comprises establishments primarily engaged in manufacturing men's, youths' and boys' shirts, collars and nightwear from purchased woven or knit fabric (cut-and-sewed). Also includes manufacturers of knit outerwear sports shirts from purchased knit fabric. Does not include work shirt manufacturers. For 1977 the 928 establishments (plants) in this industry included 469 manufacturers, 108 jobbers, 192 independent contractors and 159 multiplant company contractors.

SIC 2322 includes establishments primarily engaged in manufacturing men's, youths', boys' underwear cut and sewed from purchased woven or knit fabric.

SIC 2323 comprises establishments primarily engaged in manufacturing men's, youths' and boys' neckties, scarfs and mufflers cut and sewed from purchased woven or knit fabric.

SIC 2352 includes establishments primarily engaged in manufacturing hats, caps and hat bodies. Millinery is not included.

SIC 2252 includes mills primarily making men's and boys' hosiery. It includes mills engaged in knitting, dyeing or finishing hosiery except women's hosiery. In addition to men's and boys' hosiery, the industry makes anklets for women and children, slipper socks, etc.

SIC 2254 includes establishments primarily engaged in knitting underwear and nightwear from yarn, or in making them from knit fabric produced in the same mill.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for more purposes the best value of measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone in men's furnishings of these industries, plus the values of these products produced by manufacturers classified in other industries, are shown on pages 16 and 17.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977 & 1972.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturing Establishments in the Men's Furnishings Industry
By Employment Class Size, 1977

	<u>Establishments</u>		<u>Employees</u>		<u>Value of Shipments</u>	
	<u>No.</u>	<u>% of Total</u>	<u>No. (thous.)</u>	<u>% of Total</u>	<u>Mil. \$</u>	<u>% of Total</u>
Shirts and nightwear (SIC 2321*), total	928	100.0%	114.9	100.0%	\$2,934.6	100.0%
By Establishment Size:						
Under 20 employees	249	26.8	1.7	1.5	97.3	3.3
20-49 employees	156	16.8	5.0	4.3	336.8	11.5
50-99 employees	147	15.8	10.8	9.4	392.2	13.4
100-249 employees	229	24.7	37.5	32.6	675.4	23.0
250 or more employees	147	15.8	59.9	52.2	1,433.0	48.8
Underwear (SIC 2322*), total	76	100.0%	15.1	100.0%	\$ 419.8	100.0%
By Establishment Size:						
Under 10 employees	12	15.8	0.1	0.7	1.1	0.3
10-49 employees	17	22.4	0.5	3.3	9.5	2.3
50-249 employees	19	25.0	2.1	13.9	46.3	11.0
250-499 employees	19	25.0	6.1	40.4	137.1	32.7
500 or more employees	9	11.8	6.3	41.7	225.8	53.8
Neckwear (SIC 2323*), total	207	100.0%	6.3	100.0%	\$ 223.8	100.0%
By Establishment Size:						
Under 10 employees	99	47.8	0.2	3.2	9.1	4.1
10-19 employees	27	13.0	0.4	6.4	11.2	5.0
20-49 employees	46	22.2	1.5	23.8	53.1	23.7
50-99 employees	25	12.1	1.9	30.2	67.6	30.2
100 or more employees	10	4.8	2.3	36.5	82.8	37.0
Hats & caps (SIC 2352*), total	258	100.0%	12.4	100.0%	\$ 284.8	100.0%
By Establishment Size:						
Under 10 employees	101	39.1	0.3	2.4	7.7	2.7
10-49 employees	91	35.3	2.3	18.5	54.0	19.0
50-99 employees	30	11.6	2.2	17.7	62.7	22.0
100-249 employees	25	9.7	3.5	28.2	69.5	24.4
250 or more employees	11	4.3	4.1	33.1	90.8	31.9
Hosiery, n.e.c. (SIC 2252*), total	415	100.0%	32.2	100.0%	\$ 921.3	100.0%
By Establishment Size:						
Under 20 employees	158	38.1	1.0	3.1	31.9	3.5
20-49 employees	94	22.6	3.1	9.6	86.2	9.4
50-99 employees	62	14.9	4.4	13.7	114.5	12.4
100-249 employees	68	16.4	10.8	33.5	304.7	33.1
250 or more employees	33	8.0	12.8	39.7	384.0	41.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Manufacturing Establishments in the Men's Furnishings Industry By Employment Class Size, 1977 (continued)

	<u>Establishments</u>		<u>Employees</u>		<u>Value of Shipments</u>	
	<u>No.</u>	<u>% of Total</u>	<u>No. (thous.)</u>	<u>% of Total</u>	<u>Mil.\$</u>	<u>% of Total</u>
Knit underwear mills (SIC 2254*), total	92	100.0%	25.2	100.0%	\$648.9	100.0%
By Establishment Size:						
Under 20 employees	18	19.6	**	--	2.6	0.4
20-49 employees	14	15.2	0.5	2.0	8.2	1.3
50-99 employees	15	16.3	1.2	4.8	24.6	3.8
100-249 employees	22	23.9	3.4	13.5	98.3	15.1
250 or more employees	23	25.0	20.1	79.7	515.3	79.4

* For a definition of these SIC codes, see page 4.

** Total is less than 0.1.

n.e.c. - not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

Employment & Earnings

According to the U.S. Bureau of Labor Statistics, employment in the men's and boys' shirt and nightwear industry was 102.3 thousand in October 1980, a 2.6% decline from October 1979 and 3.6% below the 1978 average. The number of production workers fell 4.4% in October 1980 compared to 1978.

Average hourly earnings of production workers increased 21.0% from 1978 to October 1980 but because average weekly hours declined slightly, average weekly earnings did not increase as fast, rising 20.7% to \$152.04 as of October 1980.

Employment in knit underwear mills was up slightly in October 1980 versus a year ago. Average weekly hours also rose during this period after declining 4.5% in 1979 compared with 1978.

GENERAL STATISTICS ON THE INDUSTRY

Employment and Earnings in the Men's Furnishings Industry

	Monthly Averages			Annual Averages		
	Oct. 1980(p)	Oct. 1979	% Change	1979	1978	% Change 1979/1978
Shirts & nightwear (SIC 2321*)						
All employees (thous.)	102.3	105.1	- 2.7%	103.8	106.1	- 2.2%
Production workers (thous.)	88.2	91.5	- 3.6	90.5	92.3	- 2.0
Avg. weekly earnings	\$152.04	\$139.78	+ 8.8	\$136.84	\$125.96	+ 8.6
Avg. hourly earnings	\$ 4.20	\$ 3.84	+ 9.4	3.78	3.47	+ 8.9
Avg. weekly hours	36.2	36.4	- 0.5	36.2	36.3	- 0.3
Avg. overtime hours	1.1	1.2	- 8.3	1.0	1.0	--
Knit underwear mills (SIC 2254*)						
All employees (thous.)	32.0	31.8	+ 0.6%	32.3	33.5	- 3.6%
Production workers (thous.)	27.6	27.6	--	27.9	29.0	- 3.8
Avg. weekly earnings	\$169.00	\$150.95	+12.0	\$147.24	\$141.00	+ 4.4
Avg. hourly earnings	\$ 4.63	\$ 4.17	+11.0	\$ 4.09	\$ 3.74	+ 9.4
Avg. weekly hours	36.5	36.2	+ 0.8	36.0	37.7	- 4.5
Avg. overtime hours	1.4	1.3	+ 7.7	1.2	2.1	-42.9

(p) = preliminary

* For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of Labor Statistics
Employment and Earnings.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

In terms of shipment value, New York was the leading manufacturing state in 1977 in three of the six industries which constitute the overall men's furnishings industry in this Fact File. Pennsylvania was the leading state in two industries: men's & boys' underwear and knit underwear mills. North Carolina held a clearly dominant manufacturing share of the hosiery, n.e.c. classification.

Leading Manufacturing States in the Men's Furnishings Industry

	Establishments		Employees (thous.)	Value of Shipments (mil. \$)
	No.	With 20+ Employees		
Shirts and nightwear (SIC 2321*), total	928	679	114.7	\$2,934.6
Leading States:				
New York	156	69	6.1	463.2
California	130	76	5.5	241.1
North Carolina	85	71	13.6	251.5
Pennsylvania	76	67	10.4	245.8
Alabama	62	60	15.0	320.6
Tennessee	59	54	12.8	290.1
Georgia	42	40	9.2	212.5
Total, leading states	610	437	72.6	2,024.8
Percent of U.S. total	65.7%	64.4%	63.3%	69.0%
Underwear (SIC 2322*), total	76	59	15.1	\$ 419.8
Leading States:				
New York	12	4	0.3	9.8
Pennsylvania	10	7	0.8	16.6
North Carolina	8	6	(D)	(D)
Kentucky	7	7	(D)	(D)
South Carolina	6	6	1.4	31.9
Total, leading states	43	30	na	na
Percent of U.S. total	56.6%	50.8%	na	na
Neckwear (SIC 2323*), total	207	81	6.3	\$ 223.8
Leading States:				
New York	87	35	2.3	87.9
California	20	9	(D)	(D)
New Jersey	13	4	0.3	7.0
Massachusetts	10	4	0.2	5.7
Connecticut	9	6	0.3	10.5
Total, leading states	139	58	na	na
Percent of U.S. total	67.1%	71.6%	na	na

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading Manufacturing States in the Men's Furnishings Industry (continued)

	Establishments		Employees (thous.)	Value of Shipments (mil. \$)
	No.	With 20+ Employees		
Hats & caps (SIC 2352*), total	258	122	12.4	\$ 284.8
Leading States:				
New York	86	28	1.9	42.6
Missouri	34	28	(D)	(D)
Pennsylvania	20	11	(D)	(D)
California	17	5	0.4	10.1
Texas	15	7	(D)	(D)
Illinois	12	6	(D)	(D)
New Jersey	12	6	(D)	(D)
Massachusetts	11	4	0.5	9.1
Total, leading states	207	95	na	na
Percent of U.S. total	80.2%	77.9%	na	na
Hosiery, n.e.c. (SIC 2252*), total	415	257	32.2	\$ 921.3
Leading States:				
North Carolina	281	168	20.3	589.9
Tennessee	35	29	4.2	111.7
Alabama	28	15	1.4	32.2
Georgia	22	15	1.9	52.1
Total, leading states	366	227	27.8	785.9
Percent of U.S. total	88.2%	88.3%	86.3%	85.3%
Knit underwear mills (SIC 2254*), total	92	74	25.2	\$ 648.9
Leading States:				
Pennsylvania	34	29	4.5	147.5
New York	14	9	1.0	29.8
North Carolina	14	10	4.7	100.8
Tennessee	5	5	(D)	(D)
Mississippi	4	4	1.4	34.7
Total, leading states	71	57	na	na
Percent of U.S. total	77.2%	77.0%	na	na

*For a definition of these SIC codes, see page 4.

n.e.c. = not elsewhere classified

(D) = Data withheld by the Census Bureau to avoid disclosing figures for individual firms.

na = not available

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers in the Men's Furnishings Industry, 1980 (Median Results)

	No. of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales (percent)	Profits on Net Worth (percent)	Sales to Net Worth (times)
Shirts & nightwear (SIC 2321*)	156	1.88	2.40	15.95	6.72
Underwear (SIC 2322*)	14	2.05	0.52	4.85	3.75
Neckwear (SIC 2323*)	37	2.51	2.59	15.11	4.83
Hats & caps (SIC 2352*)	36	1.77	2.05	19.15	5.83
Hosiery, n.e.c. (SIC 2252*)	63	2.61	1.90	20.57	5.22
Knit underwear mills (SIC 2254*)	18	2.57	6.79	26.08	3.44

n.e.c. = not elsewhere classified.

* For a definition of these SIC codes, see page 4.

Source: Dun & Bradstreet
Key Business Ratios 1980
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PRODUCTION

The latest available information on production of selected types of men's furnishings items is contained in the Current Industrial Report (CIR) 1979 annual report on apparel issued by the Census Bureau. The CIR information is based on a sample of apparel manufacturers and thus is not as comprehensive as the census of manufactures conducted at five-year intervals. However, the CIR indicates industry trends.

Excluded from the CIR apparel survey are many small apparel firms which are included in the census of manufactures, where data is obtained for these firms from administrative records of other government agencies. In the 1977 census, these firms accounted for 6% of the total value of shipments in the men's and boys' shirts and nightwear industry, 2% in the men's and boys' underwear industry and 1% in knit underwear mills.

According to the 1979 CIR on apparel, men's dress and business shirt production declined 3.2% in 1979 compared to 1978. All reported categories of men's underwear and nightwear experienced production declines in 1979 except men's lightweight undershirts, which rose 1.0%. The biggest production decline was in the men's boxer shorts classification, which dipped 12.4% to 72 million units in 1979 compared to 82.1 million units in 1978.

Men's hosiery production, as reported by the National Association of Hosiery Manufacturers, fell 5.5% in 1979 to 866 million pairs.

PRODUCTION

Production of Reported Types of Men's Furnishings
By Type of Fabric & Construction, 1977-1979

	Production (Thous. Units)			% Change 1979/1978	% of Category 1979
	1979	1978	1977		
Men's dress & business shirts, incl. uniform	94,416	97,500	110,712	- 3.2%	100.0%
By fabric:					
All cotton and chiefly cotton	24,216	22,380	25,656	+ 8.2	25.6
All man-made and chiefly man-made	69,888	74,628	74,160	- 6.3	74.0
All other fabric, incl. fabric, n.s.k.	312	492	10,896	-36.6	0.3
By construction:					
Woven fabric	76,968	73,236	78,720	+ 5.1	81.5
Knit fabric	14,076	21,264	25,236	-33.8	14.9
Construction, n.s.k.	3,372	3,000	6,756	+12.4	3.6
Men's pajamas & other nightwear, excl. robes	17,064	18,204	21,000	- 6.3	100.0
By construction:					
Woven fabric	14,508	15,660	18,168	- 7.4	85.0
Knit fabric	2,556	2,544	1,596	+ 0.5	15.0
Construction, n.s.k.	--	--	1,236	--	--
By fabric:					
All cotton and chiefly cotton	11,940	12,288	11,580	- 2.8	70.0
All man-made and chiefly man-made	5,124	5,916	8,040	-13.4	30.0
All other fabric	--	--	1,380	--	--
Fabric, n.s.k.	--	--	1,380	--	--
Men's and boys' robes	6,960	7,212	na	- 3.5	100.0
By construction:					
Woven fabric	5,064	4,476	na	+13.1	72.8
Knit fabric	1,896	1,536	na	+23.4	27.2
Construction, n.s.k.	na	1,200	na	--	--
By fabric:					
All cotton and chiefly cotton	2,556	2,676	na	- 4.5	36.7
All man-made and chiefly man-made	2,952	2,244	na	+31.6	42.4
Fabric, n.s.k.	1,452	2,292	na	-36.6	20.9
Woven underwear:					
Men's boxer shorts	72,000	82,152	83,640	-12.4	100.0
Cotton/polyester blended fabric	50,616	56,220	53,796	-10.0	70.3
All cotton & all other cotton blends	21,384	25,932	25,080	-17.5	29.7
All other fabric, incl. fabric, n.s.k.			4,764		

(continued)

PRODUCTION

Production of Reported Types of Men's Furnishings
By Type of Fabric & Construction, 1977-1979
 (continued)

	Production (Thous. Units)			% Change 1979/1978	% of Category 1979
	1979	1978	1977		
Knit underwear:					
Men's lightweight undershirts					
w/¼ sleeve, excl. T-shirts					
made for outerwear	240,600	238,212	247,008	+ 1.0	100.0%
Cotton/polyester blended					
fabric	78,432	87,720	105,360	-10.6	32.6
All cotton & all other cotton					
blends	155,640	145,632	121,284	+ 6.9	64.7
All other fabric }	6,528	4,860	20,364	+34.3	2.7
Fabric, n.s.k. }					
Men's and boys' sleeveless athletic					
type undershirts	37,416	40,968	43,476	- 8.7	100.0
Cotton/polyester blended					
fabric	10,428	13,836	na	-24.6	27.9
All cotton & all other cotton					
blends	21,492	20,496	na	+ 4.9	57.4
All other fabric }	5,496	6,636	na	-17.2	14.7
Fabric, n.s.k. }					
Men's and boys' thermal underwear					
incl. winter weight:					
Tops (i.e., undershirts)	20,388	22,068	18,252	- 7.6	100.0
Cotton/polyester blended fabric	11,604	15,012	na	-22.7	56.9
All cotton & all other cotton					
blends	7,920	5,520	na	+43.5	38.8
All other fabric	864	1,536	na	-43.7	4.2
Bottoms (i.e., drawers, etc.)	25,956	33,084	26,508	-21.5	27.3
Cotton/polyester blended fabric	14,646	23,820	na	-38.5	71.8
All cotton & all other cotton					
blends	10,224	7,776	na	+31.5	50.1
All other fabric	1,056	1,488	na	-29.0	5.2
One piece (i.e., union suits)	2,184	2,604	2,940	-16.1	10.7
Cotton/polyester blended fabric	792	1,068	na	-25.8	3.9
All cotton & all other cotton }					
blends }	1,392	1,536	na	- 9.4	6.8
All other fabric }					
Shorts and briefs:					
Men's and boys' shorts (boxer style,					
supporter type, non-supporter					
type, etc.	4,572	4,800	3,228	- 4.8	100.0
Cotton/polyester blended fabric					
All cotton & all other cotton	4,572	4,800	na	- 4.8	100.0
blends					
All other fabric	na				

(continued)

PRODUCTION

Production of Reported Types of Men's Furnishings By Type of Fabric & Construction, 1977-1979 (continued)

	Production (Thous. Units)			% Change 1979/1978	% of Category 1979
	1979	1978	1977		
Shorts and briefs (cont'd.)					
Men's supporter-type knit briefs	255,492	229,680	210,096	+11.2	100.0%
Cotton/polyester blended fabric	78,120	86,460	79,824	- 9.7	37.6
All cotton & all other cotton blends	173,988	140,952	122,376	+23.4	75.7
All other fabric	3,384	2,268	4,788	+49.2	1.5
Fabric, n.s.k.	--	--	3,108	--	--
Hosiery, men's					
Size 10 & up; (thous. pairs)	865,956	916,560	831,960	- 5.5	100.0
Anklelets	519,276	615,672	606,552	-15.7	60.0
Foot socks	4,908	4,260	2,640	+15.2	0.6
Knee	192,024	161,532	109,032	+18.9	22.2
Midcalf	149,748	135,096	113,736	+10.8	17.3

na = not available

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports, Apparel,
MA-23A & National Association of
Hosiery Mfgs., 1979 Hosiery Statistics.

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977

	<u>Delivered Cost (million \$)</u>
Shirts & nightwear (SIC 2321*), total	\$1,107.9
Broad woven fabrics	400.7
Purchased knitted fabrics	365.8
All other materials, containers and supplies	341.4
Underwear (SIC 2322*), total	182.3
Broad woven fabrics	30.3
Purchased knitted fabrics	112.4
All other materials, containers and supplies	39.6
Neckwear (SIC 2323*), total	93.4
Broad woven fabrics	49.5
Purchased knitted fabrics	1.8
All other materials, containers and supplies	42.1
Hosiery, n.e.c. (SIC 2252*), total	478.1
Hosiery in the griage	134.8
Cotton yarns	53.1
Nylon spun yarns	28.7
Acrylic yarns	71.7
Nylon filament yarns	42.6
Spandex filament yarns	4.8
All other yarns	29.7
All other materials, containers and supplies	112.7
Knit underwear mills (SIC 2254*), total	325.8
Purchased knitted fabrics	7.5
Carded cotton yarns	94.5
Combed cotton yarns	40.7
Man-made fiber yarns, filament and spun	34.4
All other yarns	25.7
All other materials, containers and supplies	123.0

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

At the beginning of 1981, monthly reports in the CIR apparel series for 1979 and 1980 were under revision based on the 1979 annual apparel report. Monthly production figures for 1980 (subject to revision) show a 2.4% decline in men's dress and business shirt cuttings compared to 1979.

PRODUCTION

Seasonality in Production

Cuttings of men's dress and business shirts for the first three months of 1980 equaled 27.9% of overall 1980 production. Monthly production figures for other furnishings items were not available.

Percent of Men's Dress & Business Shirt Cuttings By Month, 1980

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1980	100.0%	10.0%	8.8%	9.1%	8.6%	8.3%	9.5%	6.1%	8.4%	8.4%	9.9%	7.1%	5.7%

Source: U.S. Bureau of the Census,
Current Industrial Report,
Men's Apparel M23B(80)-12.

SHIPMENTS

Monthly and annual data on production and value of shipments for some men's furnishings items are reported in the Current Industrial Report on apparel issued by the Census Bureau. However, the data is subject to the limitations previously noted in the Production segment of this Fact File and is not directly comparable to the broader-based 1977 census data.

According to the CIR, value of shipments of men's dress and business shirts increased 3.6% in 1979 from 1978. The largest increase from 1978 to 1979 in reported categories of men's furnishings was in men's and boys' robes, which increased 26.9% in shipment value to \$62.2 million. Men's supporter-type knit briefs rose 22% in shipment value to \$238.8 million from \$195.8 million in 1978.

Value of Shipments of Specified Items of Men's Furnishings, 1978, 1979

	(Mil. \$)		% Change 1979/1978
	1979	1978	
Dress & business shirts, incl. uniform	\$656.4	\$633.8	+ 3.6%
Pajamas & other nightwear, excl. robes	87.7	87.3	+ 0.5
Robes*	62.2	49.0	+26.9
Boxer shorts	86.0	91.9	- 6.4
Lightweight undershirts with 1/4 sleeve, excl. T-shirts made for outerwear	275.5	263.3	+ 4.6
Sleeveless athletic type undershirts*	30.5	30.1	+ 1.3
Thermal underwear, incl. winter weight*:			
Tops (i.e., undershirts)	50.7	49.5	+ 2.4
Bottoms (i.e., drawers, etc.)	62.3	72.0	-13.5
One piece (i.e., union suits)	9.2	10.3	-10.7
Shorts (boxer style, supporter type, etc.)*	4.0	4.2	- 4.8
Supporter-type knit briefs	238.8	195.8	+22.0

*Includes boys', as well as men's. Separate figures not available.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel, MA-23A(79)-1.

SHIPMENTS

The latest industry-wide information on quantity and value of shipments of men's furnishings comes from the 1977 Census of Manufactures. For some furnishings items such as neckwear, hats and caps and hosiery, the census provides the only shipment information available.

The 1977 census data show the value of men's hats and caps shipments rose 83.4% in the five-year period between 1972 and 1977. Over the same period, men's & boys' neckwear fell 24.3% in shipment value to \$21.3 million. Polyester neckties dropped 38.3% in value and 57.5% in quantity compared to 1972.

Quantity and Value of Shipments of Specified Furnishings By All Producers, 1972, 1977

	Quantity (thous. units)		% Change 1977/1972	Value (mil. \$)		% Change 1977/1972
	1977	1972		1977	1972	
Dress & sport shirts	273,780	339,744	- 19.4%	\$1,368.3	\$1,084.9	+ 26.1%
Underwear & nightwear,						
total	868,536	969,384	- 10.4	925.2	696.1	+ 32.9
Made in knitting mills	459,456	546,780	- 16.0	431.0	360.3	+ 19.6
Made in cut-and-sew shops	409,080	422,604	- 3.2	494.2	335.8	+ 47.2
Underwear	372,576	380,352	- 2.0	341.4	230.5	+ 48.1
Nightwear	36,504	42,252	- 13.6	152.8	105.3	+ 45.1
Neckwear, total	na	na	--	211.3	279.3	- 24.3
Neckties, woven fabrics,						
incl. prints	na	143,952	--	125.0	222.6	- 43.8
All silk	5,760*	10,944	- 47.4	25.8	26.6	- 3.0
All rayon and/or acetate	(S)	23,148	--	5.1	26.8	- 81.0
All polyester	34,440	81,072	- 57.5	81.9	132.7	- 38.3
All other fabrics, incl.						
blends	(S)	28,788	--	12.2	36.5	- 66.6
All other men's & boys' neck-						
wear, incl. knit neckties						
& knit or woven mufflers						
and scarves	2,832**	7,776	- 63.6	8.8	9.5	- 7.4
Neckwear, n.s.k.	na	na	--	77.5	47.2	+ 64.2
Hats & caps, total	na	na	--	270.5	147.5	+ 83.4
Hats & hat bodies, except						
cloth & millinery	na	na	--	66.5	44.4	+ 49.8
Finished straw hats,						
except harvest hats,						
men's & boys'	5,100	4,584	+ 11.3	16.6	9.6	+ 72.9
Wool-felt finished hats,						
except millinery	4,524	4,932	- 8.3	14.9	8.4	+ 77.4
Fur-felt finished hats,						
except millinery	1,188	3,444	- 65.5	19.8	20.1	- 1.5
Hat bodies, except those						
finished in the same						
plant	3,504	3,060	+ 14.5	12.9	5.4	+138.9
Hats & hat bodies, except						
cloth & millinery, n.s.k.	na	na	--	2.3	0.9	+155.6

(continued)

SHIPMENTS

Quantity & Value of Shipments of Specified Furnishings
By All Producers, 1972, 1977
 (continued)

	Quantity (thous. units)		% Change 1977/1972	Value (mil. \$)		% Change 1977/1972
	1977	1972		1977	1972	
Hats & caps, total (cont'd.)						
Cloth hats & caps	88,976	56,576	+ 57.3%	\$135.4	\$ 54.9	+146.6%
Cloth hats, except uniform	10,308	17,688	- 41.7	26.9	22.8	+ 18.0
Caps, except uniform	78,768	36,888	+113.5	108.5	32.1	+238.0
Cloth hats & caps, n.s.k.	na	na	--	4.9	1.9	+157.9
Hats & caps, n.s.k.	na	na	--	27.4	19.2	+ 42.7
All other hats & caps, incl. harvest hats, women's uniform hats & caps, head wear from purchased fur on skin, etc.	24,468	15,600	+ 56.8	21.3	10.5	+102.9
Men's hosiery (size 10 & up, total*** (thous. pairs)	1,315,164	1,008,936	+ 30.3	587.8	376.0	+ 56.3
Men's finished seamless hosiery	970,200	696,960	+ 39.2	136.3	83.5	+ 63.2
Anklets, incl. crew & athletic socks, etc.	758,640	545,160	+ 39.1	358.3	218.2	+ 64.2
Cotton and/or wool	301,560	247,560	+ 21.8	136.3	83.5	+ 63.2
Man-made	457,080	297,600	+ 53.6	222.0	134.7	+ 64.8
Midcalf, incl. half-hose	88,308	95,136#	- 7.2	43.9	43.0	+ 2.1
All other, incl. foot socks (knee, bermuda, campus, etc.)	116,160	39,840	+191.6	59.1	17.8	+232.0
Men's finished seamless hosiery, n.s.k.	7,092	16,824##	- 57.8	3.3	6.9	- 52.2
Men's seamless hosiery, all types, shipped in the grieg	192,876	206,208	- 6.5	62.0	55.3	+ 12.1

na = not available

n.s.k. - not specified by kind.

(S) = Withheld by the Census Bureau because the estimate did not meet publication standards.

* 10-19% of this total has been estimated by the Census Bureau.

** 20-29% of this total has been estimated by the Census Bureau.

10-30% of this total has been estimated by the Census Bureau.

Entire quantity has been estimated by the Census Bureau.

*** Hosiery data includes substantial duplication. Value of hosiery shipped in the grieg is, in effect, counted twice, once as a shipment of the establishment producing grieg goods to dyeing and finishing plants, and again in finished hosiery shipped by dyeing and finishing plants.

Source: U.S. Bureau of the Census,
 Census of Manufactures, 1977,
Industry Series. -17-

SHIPMENTS

Shipments By Region

Among the seven men's & boys' furnishings categories for which 1977 value of shipments were broken down by geographic area by the Census Bureau, the Middle Atlantic Division - and specifically Pennsylvania - was the only geographic region mentioned in all categories. The South Atlantic division was an important shipping region for six of the seven furnishings items.

States mentioned most frequently as shipment leaders in the designated categories were Pennsylvania and New York (Middle Atlantic division), Georgia, North Carolina and South Carolina (South Atlantic division), Alabama (East South Central division), and Texas (West South Central division).

Value of Shipments of Specified Furnishings By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (Mil. \$)		% Change 1977/1972
	1977	1972	
Dress & sport shirts, United States, total	\$1,344.6	\$1,069.5	+ 25.7%
Middle Atlantic Division:			
New York	218.9	192.6	+ 13.6
New Jersey	16.8	40.0	- 58.0
Pennsylvania	81.6	87.9	- 7.2
South Atlantic Division:			
Maryland	19.2	na	--
North Carolina	69.4	73.6	- 5.7
South Carolina	67.5	57.1	+ 18.2
Georgia	137.7	120.3	+ 14.5
Florida	15.9	6.1	+160.7
East South Central Division:			
Kentucky	47.6	na	--
Tennessee	158.3	112.1	+ 41.2
Alabama	119.1	112.5	+ 5.9
Mississippi	33.4	23.6	+ 41.5
West South Central Division:			
Texas	15.9	3.2	+396.9
Pacific Division:			
California	140.0	44.8	+212.5
Hawaii	9.1	na	--
Nightwear, United States, total	152.8	105.3	+ 45.1
Middle Atlantic Division:			
New York	65.2	37.7	+ 72.9
Pennsylvania	18.9	na	--
South Atlantic Division:			
South Carolina	14.7	55.0	- 73.3

(continued)

SHIPMENTS

Value of Shipments of Specified Furnishings
By All Producers by Geographic Area, 1972, 1977
 (continued)

	Value of Shipments (Mil. \$)		% Change 1977/1972
	1977	1972	
Knit & woven underwear			
United States, total	\$ 341.4	\$ 230.5	+ 48.1%
Middle Atlantic Division:			
New York	18.6	na	na
Pennsylvania	13.5	na	na
South Atlantic Division:			
South Carolina	26.8	na	na
Georgia	29.4	na	na
East South Central Division:			
Alabama	14.4	na	na
Knit underwear & nightwear			
United States, total	431.0	360.3	+ 19.6
Middle Atlantic Division:			
New York	14.8	na	--
Pennsylvania	95.8	107.6	- 11.0
South Atlantic Division:			
North Carolina	72.9	na	--
East South Central Division:			
Mississippi	24.6	na	--
Men's finished seamless hosiery			
United States, total	464.6	285.9	+ 62.5
Middle Atlantic Division:			
Pennsylvania	29.1	na	--
South Atlantic Division:			
North Carolina	169.9	110.5	+ 53.8
Georgia	17.4	na	--
East South Central Division:			
Tennessee	40.6	41.1	- 1.2
Alabama	18.2	na	--
Hats & hat bodies, except cloth & millinery			
United States, total	66.4	44.4	+ 49.5
Middle Atlantic Division:			
New York	4.2	na	--
Pennsylvania	13.4	9.8	+ 36.7
West South Central Division:			
Texas	25.6	na	--
Cloth hats & caps, United States, total	176.6	83.9	+110.5
Middle Atlantic Division:			
New York	22.8	13.3	+ 71.4
New Jersey	2.6	1.7	+ 52.9
Pennsylvania	20.2	4.5	+348.9

(continued)

SHIPMENTS

Value of Shipments of Specified Furnishings
By All Producers By Geographic Area, 1972, 1977
 (continued)

	Value of Shipments (Mil. \$)		% Change 1977/1972
	1977	1972	
Cloth hats & caps (continued)			
East North Central Division:			
Wisconsin	\$ 5.4	\$ na	--
West North Central Division:			
Minnesota	2.6	na	--
Missouri	48.9	22.3	+119.3%
South Atlantic Division:			
Virginia	11.3	4.7	+140.4
West South Central Division:			
Texas	9.1	9.9	- 8.1
Pacific Division:			
California	2.2	na	--

na = not available.

Source: U.S. Bureau of the Census,
 Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICES

Producer prices for men's wear rose an average 7.7% in 1980 over 1979. Of the specified men's furnishings items, producer prices for men's pajamas & other nightwear rose the least (2.4%) while the largest increase was in men's briefs (8.7%). In the two year period between 1978 and 1980, men's dress and business shirts increased 19.8% at the wholesale level.

PRODUCER PRICES

Producer Prices for Specified Men's Furnishings, 1978-1980 (Dec. 1977 = 100 unless otherwise indicated)

	Annual Averages			% Change	
	1980(p)	1979	1978	1980/ 1979	1980/ 1978
All men's wear (1967 = 100)	200.3	186.0	176.1	+7.7%	+13.7%
Dress & business shirts	120.2	114.2	100.3	+5.2	+19.8
Pajamas & other nightwear (1967 = 100)	214.9	209.9	199.4	+2.4	+ 7.8
Briefs	114.3	105.1	101.5	+8.7	+12.6
Socks	122.3	113.5	104.1	+7.7	+17.5
Ties (1973 = 100)	118.4	111.9	107.6	+5.8	+10.0
Hats & caps	118.7	110.0	104.8	+7.9	+13.3

(p) = preliminary

Source: U.S. Dept. of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Compared with 1978, imports of specified men's furnishings rose 9.9% in value in 1979 although the quantity imported declined 0.2%, according to the U.S. Department of Commerce. Men's and boys' pajamas and other nightwear, the largest import category covered in terms of value, increased 23.6% in dollars and 13.6% in units in the 1979 period.

Over the first nine months of 1980, the quantity of specified men's and boys' furnishings imported decreased 14.1% from the same nine months in 1979 but their import value was 5.6% higher. The largest increase in this period was in men's and boys' dressing gowns of man-made fibers (not knit), which rose 115.8% in import value and 712.7% in quantity.

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings
By Leading Countries of Origin, 1978, 1979

	Quantity (dozens)		% Change 1979/1978	C.I.F. Value (thous. \$)		% Change 1979/1978
	1979	1978		1979	1978	
Furnishings, reported categories, total	4,337,618	4,345,657	- 0.2%	\$130,610	\$118,819	+ 9.9%
Dress shirts, cotton, not knit	778,376	771,836	+ 0.8	44,306	39,168	+ 13.1
Hong Kong	470,881	460,089	+ 2.3	27,454	22,659	+ 21.2
India	128,081	132,121	- 3.1	5,450	5,021	+ 8.5
Work shirts, cotton, not knit	249,761	299,095	- 16.5	7,697	8,405	- 8.4
Mainland China	64,920	46,791	+ 38.7	1,691	1,232	+ 37.3
Hong Kong	57,175	110,345	- 48.1	1,944	3,286	- 40.8
Pajamas & other nightwear, not knit	853,389	751,257	+ 13.6	31,934	25,827	+ 23.6
Cotton	614,772	531,797	+ 15.6	23,534	18,836	+ 24.9
Hong Kong	270,167	315,596	- 14.4	10,528	11,364	- 7.4
Dominican Republic	153,964	68,730	+124.0	5,706	2,340	+143.8
Man-made fibers	238,617	219,460	+ 8.7	8,400	6,991	+ 20.1
Dominican Republic	176,065	155,780	+ 13.0	6,006	5,108	+ 17.6
Dressing gowns, not knit	94,707	119,182	- 20.5	7,487	10,218	- 26.7
Wool	1,425	2,102	- 32.2	361	404	- 10.6
India	700	--	--	170	--	--
Man-made fibers	5,182	7,747	- 33.1	261	482	- 45.8
Cotton	88,100	109,333	- 19.4	6,865	9,332	- 26.4
Taiwan	27,157	31,691	- 14.3	971	1,064	- 8.7
Dominican Republic	16,318	13,469	+ 21.1	1,734	1,246	+ 39.2
Undergarments, nspf	na	na	--	9,948	7,255	+ 37.1
Textile material, not knit	na	na	--	551	435	+ 26.7
Nicaragua	na	na	--	447	200	+123.5
Textile materials, knit	1,103,696	852,403	+ 29.5	9,397	6,820	+ 37.8
Hong Kong	482,239	336,315	+ 43.4	2,352	1,286	+ 82.9
Mexico	353,757	176,663	+100.2	3,196	1,547	+106.6
T-shirts, cotton, not knit	919,380	1,186,747	- 22.5	11,27	13,002	- 13.3
Pakistan	408,084	494,400	- 17.5	2,387	2,762	- 13.6
Poland	113,440	160,500	- 29.3	1,211	1,400	- 13.5
Neckties, textile materials	319,840	333,141	- 4.0	15,577	12,331	+ 26.3
Italy	212,102	207,123	+ 2.4	9,122	6,996	+ 30.4
England	23,931	36,186	- 33.9	1,536	1,680	- 8.6

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings
By Leading Countries of Origin, 1978, 1979
 (continued)

	Quantity (dozens)		% Change 1979/1978	C.I.F. Value (thous. \$)		% Change 1979/1978
	1979	1978		1979	1978	
Headwear, fur not on the						
skin	18,469	31,996	- 42.3%	\$ 2,385	\$ 2,613	- 8.7%
Portugal	5,233	13,302	- 60.7	347	455	- 23.7
Italy	3,428	3,358	+ 2.1	472	596	- 20.8

*C.I.F. value represents the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance, and other charges (excluding U.S. export duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

nspf = not specially provided for.
 na = not available.

Source: U.S. Bureau of the Census,
 U.S. General Imports FT 135,
 Dec. 1979 and 1978.

Exports

U.S. exports of specified men's & boys' furnishings were valued at \$56.8 million in 1979, up 33.8% over the 1978 export value of \$42.4 million. Quantity of furnishings exports rose 28.4% over the same period. Men's and boys' cotton hosiery, an export category not reported in 1978, is not included in the above totals. In 1979, the export value of this category was \$5.6 million from 912,000 dozen pairs exported.

Men's & boys' dress shirts rose 46.5% in export value. Robes and dressing gowns exported showed the largest percentage increase in value of any category reported in 1979 compared to 1978. Pajamas and other nightwear decreased 1% from their 1978 value, the biggest decline among the categories.

FOREIGN TRADE

ExportsQuantity & Value of Exports of Specified Furnishings, 1978, 1979

	Quantity (dozens)		% Change 1979/1978	F.A.S. Value* (thous.\$)		% Change 1979/1978
	1979	1978		1979	1978	
Furnishings, reported categories, total	2,977,364	na	--	\$62,428	na	--
Dress shirts, not knit	327,024	196,203	+ 66.7%	8,597	\$ 5,867	+ 46.5%
Cotton	183,501	95,609	+ 91.9	4,432	2,710	+ 63.5
Man-made	143,523	100,594	+ 42.7	4,165	3,157	+ 31.9
Work shirts, not knit	128,969	96,378	+ 33.5	2,397	1,912	+ 25.4
Cotton	61,264	33,645	+ 82.1	1,598	1,083	+ 47.5
Man-made	67,432	62,733	+ 7.5	799	829	- 3.6
Dress & work shirts, knit	114,966	111,826	+ 2.8	4,501	4,535	- 0.8
Cotton	43,148	39,638	+ 8.8	2,371	2,194	+ 8.1
Man-made	71,818	72,188	- 0.5	2,130	2,341	- 9.0
Robes & dressing gowns, not knit	203,578	88,314	+130.5	4,254	1,673	+154.3
Cotton	193,645	81,322	+138.1	3,895	1,419	+174.5
Wool	3,988	912	+337.3	155	38	+307.9
Man-made	5,945	6,080	- 2.2	204	216	- 5.6
Pajamas & other nightwear, total	373,657	470,849	- 20.6	10,117	10,223	- 1.0
Not knit	65,417	121,855	- 46.3	1,667	1,616	+ 3.2
Cotton	17,432	52,877	- 67.0	577	690	- 16.4
Wool	5,974	2,240	+166.7	139	159	- 12.6
Man-made	37,607	52,442	- 28.3	870	603	+ 44.3
Other textile material	4,404	14,296	- 69.2	81	164	- 50.6
Knit	308,240	348,994	- 11.7	8,450	8,607	- 1.8
Cotton	282,759	314,421	- 10.1	7,590	8,239	- 7.9
Man-made	6,535	2,846	+129.6	235	110	+113.6
Wool	17,394	3,491	+398.2	556	102	+445.1
Other textile material	1,552	28,236	- 94.5	69	156	- 55.8
Underwear, total	936,596	820,882	+ 14.1	9,147	8,439	+ 8.4
Underwear, briefs, drawers, undershorts	710,621	588,318	+ 20.8	6,966	5,859	+ 18.9
Not knit	382,706	295,768	+ 29.4	2,317	1,880	+ 23.2
Cotton	72,092	129,182	- 44.2	626	993	- 37.0
Man-made	310,614	166,586	+ 86.5	1,691	887	+ 90.6
Knit	327,915	292,550	+ 12.1	4,649	3,979	+ 16.8
Cotton	287,761	241,241	+ 19.3	4,104	3,330	+ 23.2
Man-made	40,154	51,309	- 21.7	545	649	- 16.0
Underwear, other than briefs, drawers & undershorts	201,604	189,283	+ 6.5	1,827	2,034	- 10.2
Not knit	150,407	133,944	+ 12.3	721	793	- 9.1
Cotton	45,158	47,048	- 4.0	291	393	- 25.9
Man-made	105,249	86,896	+ 21.1	430	400	+ 7.5

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Furnishings, 1978, 1979
(continued)

	Quantity (dozens)		% Change 1979/1978	F.A.S. Value* (thous.\$)		% Change 1979/1978
	1979	1978		1979	1978	
Underwear (continued)						
Knit	51,197	55,339	- 7.5%	\$ 1,106	\$ 1,241	- 10.9%
Cotton	32,897	41,289	- 20.3	922	1,065	- 13.4
Underwear, nspf of textile material not specified	24,371	43,281	- 43.7	354	546	- 35.2
Not knit	5,527	7,970	- 30.6	84	110	- 23.6
Knit	18,844	35,311	- 46.6	270	436	- 38.1
T-shirts, all white, knit	825,223	403,597	+104.5	16,611	8,657	+ 91.9
Cotton	762,631	376,353	+102.6	14,909	7,967	+ 87.1
Man-made	62,592	27,244	+129.7	1,702	690	+146.7
Neckties, textile materials	91,280	149,514	- 38.9	1,157	1,115	+ 3.8
Not knit	72,501	115,947	- 37.5	921	868	+ 6.1
Knit	18,779	33,567	- 44.0	236	247	- 4.4
Hosiery, cotton (dozen pairs)	912,004	nr	--	5,647	nr	--

nspf = not specially provided for.

nr = not reported.

na = not available.

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1979 and 1978.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

Male Population of the U.S., 1979 & Projections* to 2000
(Thousands of Males)

	1979	1985	2000	% Change - 2000/1979	Percent of Male Population		
					1979	1985	2000
Total, all ages	107,457	113,366	126,558	+17.8%	100.0%	100.0%	100.0%
Under 16 years	27,724	28,288	31,296	+12.9	25.8	25.0	24.7
16 years & over	79,733	85,078	95,291	+19.5	74.2	75.0	75.3
16-19 years	8,548	7,290	7,993	- 6.5	8.0	6.4	6.3
20-34 years	27,837	30,142	25,662	- 7.8	25.9	26.6	20.3
35-49 years	17,749	20,976	29,556	+66.5	16.5	18.5	23.3
50-64 years	15,582	15,659	19,364	+24.3	14.5	13.8	15.3
65 years & over	10,017	11,013	12,716	+26.9	9.3	9.7	10.0
Median age in years	28.8	30.3	34.1				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977) &
870 (Jan. 1980).

Between 1979 and 1985, the Census-Bureau forecasts an 18.2% increase in the number of males aged 35-49 years in the U.S. By the year 2000, it is expected that this age group will be 67.1% larger than in 1979 and represent 23.3% of the total male population. Older age groups (50-64 years, 65 years and over) are also expected to increase significantly in numbers during these years.

These statistics show more American males entering their prime earnings years, where their earnings will be at their peak. This is good news for manufacturers of men's furnishings because the corresponding increase in personal disposable income for these males will surely spurt sales of these items upwards.

RETAIL SALES

The men's furnishings classification encompasses a great variety of products, including shirts, neckwear, underwear, nightwear, etc., which are sold in different types of retail outlets. This diversity, plus the fact that some items, such as certain types of shirts, might be classified as sportswear rather than furnishings, and other items are considered by some stores as accessories, separate from furnishings, make it difficult to report an accurate estimate on the total value of men's furnishings at the retail level.

Total personal consumption expenditures for all men's wear in 1979 amounted to about \$28.6 billion, based on Department of Commerce data, of which it appeared that men's furnishings (not including jewelry or such accessories as small leather goods) accounted for close to \$10 billion, with breakdowns estimated as follows:

(continued)

RETAIL SALES

Estimated Expenditures For Men's Furnishings, 1979 (Millions of Dollars)

Shirts (dress, sport, work)	\$4,400
Underwear	1,325
Nightwear, robes	390
Hosiery	750
Hats, caps	600
Gloves, mittens	230
Other, including neckwear, belts, etc.	2,000

Current Sales Trends

Dress Shirts: Sales of men's dress shirts in 1980 were buoyed by the recession/inflation-induced reluctance of men to purchase new suits. Shirts, as well as other furnishings items, were bought to liven up an old wardrobe rather than buy more expensive clothing. In 1979, dress shirt sales reached approximately \$1.5 billion. Nearly 80% of woven dress shirts were purchased at \$12.25 and under that year.

Underwear: Consumer acceptance of fashion underwear, with its emphasis on styling and coloration, has helped boost overall men's underwear sales to an estimated \$1.3 billion in 1979. Almost 20% of underwear sales in department and specialty stores during 1980 was derived from fashion underwear, and the trend is expected to continue in 1981. (Daily News Record January 5, 1981). Reasons cited by retailers for the popularity of fashion underwear include increased fashion consciousness on the part of men, their continued interest in health and fitness and improved display and packaging ideas for the product.

Nightwear: Retailers expect 1981 to be another good year for sales of men's nightwear and loungewear. In 1980, nightshirts helped to revitalize the men's sleepwear category because they appeal to a younger customer who had previously been sales resistant to traditional sleepwear. Sales of pajamas and robes were \$390 million in 1979. Sales gains of 25% or more in robes were reported by retailers for 1980. Increased leisure time spent at home, and the energy crisis are two major reasons for the sales appeal of warm, comfortable nightwear/loungewear.

Neckwear: Fall 1980 sales of men's neckwear rose 20%-35% above fall 1979 sales, according to a survey by Daily News Record (December 3, 1980) of department and specialty stores. Traditional and classic ties, such as repp stripes, foulards and clubs, and ties made from natural fibers (primarily silks and wools), were the most popular neckwear items. Consumer demand for quality ties which will last a long time is creating little or no price resistance up to a \$15 price point, say retailers in the survey.

Hosiery: In 1979 the sale of 620 million pairs of men's hosiery were valued at retail at \$720 million, a record figure for men's hosiery. Sales gains are primarily due to the dramatic increase in sales of athletic/active socks, which now account for almost 24% of men's hosiery sales. The National Association of Hosiery Manufacturers estimated 1979 per capita consumption of men's socks at 10.5 pairs, up from 9.7 pairs in 1975.

(continued)

RETAIL SALES

Current Sales Trends

Headwear: As men gain more fashion-consciousness, sales of headwear benefit. The Headwear Institute of America projects 1980 sales to be almost \$1 billion, an impressive rise from sales of \$300 million in 1974. Western hats were among the most popular styles in 1980 and are expected to sell well in 1981, with some retailers insisting this style will become a classic. Headwear trends in 1981 are towards traditional downbrims and fashion straw hats.

Other items, such as jewelry, small leather goods, etc., are considered to be accessories by some stores and information about them may be found in a Fact File covering Fashion Accessories (Men's and Women's). Additional information on the hosiery industry is included as part of the Bodywear, Legwear/Hosiery (Men's, Women's and Children's) Fact File. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear, Jeans and Active Wear Fact File.

RETAIL SALES BY STORE TYPE

The 1977 Census of Retail Trade contains the only official information available on sales of specified men's furnishings in various types of stores with payrolls. Not all store types broke out their sales in detail, but the following information reflects sales in the major outlet types. (Comparative figures for earlier years are not available due to change in the merchandise classification system.)

Shirts

Sales of men's dress and sport shirts reported by leading outlet types came to a total of \$2.6 billion in 1977. Department stores accounted for the major share, 50.9%.

Reported Sales of Men's Dress & Sport Shirts (Woven)

By Store Type, 1977

(Includes only stores with payroll)

	<u>Stores Reporting Sales</u>		<u>Sales</u>	
	<u>Number*</u>	<u>% of Total</u>	<u>Mil. \$</u>	<u>% of Total</u>
Men's dress & sport shirts	42,404	100.0%	\$2,625.2	100.0%
Department stores**	7,702	18.2	1,336.3	50.9
Men's wear stores	16,894	39.8	798.4	30.4
Family clothing stores	12,578	29.7	412.2	15.7
Other (women's ready-to-wear stores, men's shoe stores, mail order houses)	5,230	12.3	78.3	3.0

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Shirts (continued)

Sales of men's novelty shirts, T and knit shirts by the major types of outlets reporting sales came to a total of \$712.1 million in 1977. It should be noted that these items are also sold in variety stores, drug stores, supermarkets and other outlet types for which information is not available.

Reported Sales of Men's Novelty/Knit Shirts By Store Type, 1977 (Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. \$	% of Total
Men's novelty/knit shirts	23,241	100.0%	\$712.1	100.0%
Department stores**	3,893	16.7	373.9	52.5
Men's wear stores	9,490	40.8	223.4	31.4
Family clothing stores	6,575	28.3	100.9	14.2
Mail order houses	3,283	14.1	13.9	1.9

(See footnotes on preceding table.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Hosiery, Pajamas, Underwear

Leading store types sold a total of \$1.4 billion worth of men's hosiery, pajamas and underwear in 1977. Department stores accounted for almost two-thirds of the reported total, which does not cover outlet types not listed below, such as supermarkets, drug stores, variety stores, etc.

Reported Sales of Men's Hosiery, Pajamas & Underwear By Store Type, 1977 (Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. \$	% of Total
Men's hosiery, pajamas & underwear	36,570	100.0%	\$1,370.0	100.0%
Department stores**	6,943	19.0	902.8	65.9
Men's wear stores	12,300	33.6	203.5	14.9
Family clothing stores	9,372	25.6	190.5	13.9
Family shoe stores	3,105	8.5	28.0	2.0
Men's shoe stores	517	1.4	3.7	0.3
Mail order houses	3,572	9.8	31.8	2.3
Women's ready-to-wear stores	761	2.1	9.7	0.7

(See footnotes for table on men's dress & sport shirts.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Sales Contribution To Total Men's & Boys' Wear Business

Percent of Total Men's & Boys' Wear Sales Accounted For By
Specified Men's Furnishings In Key Store Types Reporting Sales, 1977

	Total Men's & Boys' Wear Sales* Mil. \$	% of Total Accounted For By Men's:		
		Dress & Sport Shirts	Novelty/ Knit Shirts	Hos., pj's, Underwear
Department stores	\$10,574.9	12.6%	3.5%	8.5%
Men's wear stores	6,275.4	12.7	3.6	3.2
Family clothing stores	3,001.5	13.7	3.4	6.3

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977.

Men's Wear Stores

Men's Wear Stores
By Sales Size of Stores, 1977

	Stores		Sales	
	No.	% of Total	Mil. \$	% of Total
Total establishments:	20,349	100.0%	\$6,563.1	100.0%
Annual sales volume:				
Less than \$100,000	5,018	24.7	257.2	3.9
\$100,000-499,999	12,027	59.1	2,948.5	44.9
\$500,000-999,999	2,307	11.3	1,587.7	24.2
\$1 million - 1,999,999	779	3.8	1,036.6	15.8
\$2 million & over	218	1.1	733.0	11.1

*Covers establishments in SIC 561 primarily selling men's & boys' ready-to-wear clothing & furnishings. Includes only establishments operated entire year.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Establishment & Firm Size,
RC77-S-1.

Sales of All Men's Wear Stores, 1977-1980

	1980(p)	1979	1978(r)	1977	% Change	
					1980/ 1979	1980/ 1977
Total sales (mil. \$)	\$8,176	\$7,830	\$7,503	\$6,943.2	+4.4%	+17.8%
No. of Stores	na	na	na	22,683	--	--

(p) = preliminary
(r) = revised.

Source: U.S. Bureau of the Census,
Current Business Reports, 1979 Retail Trade;
1977 Census of Retail Trade RC77-A-52.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

Men's furnishings sales accounted for a median 19.4% of total sales in men's specialty stores in 1979, according to Menswear Retailers of America. The average initial markup for men's furnishings in these stores was a median 50.9%. A typical men's specialty store increased sales by 2.4% over 1978.

Sales of men's neckwear increased a typical 7.5% in 1979 over 1978. Median sales of men's underwear and sleepwear declined from 1978 levels in men's specialty stores.

Selected 1979 Merchandising & Operating Results in Men's Wear Stores (Median Results)

	Men's					
	Dress Shirts	Neck- wear	Hosiery	Under- wear	Sleep- wear	Head- wear
% change in sales from last year (83)*	+ 4.9%	+ 7.5%	+ 3.5%	- 1.5%	- 2.5%	+ 5.2%
% of total store sales (102)*	6.5	2.8	1.0	1.2	0.8	0.6
% of men's furnishings sales (102)*	40.0	18.2	5.6	8.6	5.2	4.2
% distribution of average inventory in men's furnishings dept. (49)*	39.5	11.9	5.3	10.1	6.3	4.6
Markdowns, % of men's furnishings sales (63)*	9.2	9.2	3.0	2.8	4.1	9.3
Number of stock turns (49)*	1.8	2.6	2.3	1.5	1.6	1.7

*Number in parenthesis refers to the number of reporting firms in each category.

Source: Menswear Retailers of America,
1979 Annual Business Survey.

Department Stores

Profile of Department Stores (SIC 531), 1977

<u>Sales Size of Stores</u>	<u>Stores</u>		<u>Sales</u>	
	Number	%	Thous. \$	%
Total all stores*	8,807		\$76,909,452	
Stores operated entire year	8,401	100.0%	75,590,405	100.0%
with annual sales of				
\$5 mil. & over	4,995	59.5	65,269,516	86.4
\$2 mil. - \$4.9 mil.	2,794	33.2	9,406,059	12.4
Under \$2 million	612	7.3	914,731	1.2

*Each business location is counted as a separate store. Includes discount department stores and department store outlets of mail order chains as well as traditional department stores.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade,
Establishment & Firm Size,
RC 77-S-1.

RETAIL SALES BY STORE TYPE

Department Stores

According to the National Retail Merchants Association, men's furnishings sales in department stores with total sales over \$1 million rose a median 5.6% in 1979 from the year before. Typical sales per square foot of selling space were much higher for men's furnishings than for the entire upstairs store in general.

Sales of men's ties increased a median 7.8% in 1979, while dress shirt sales rose 7.1%.

Selected 1979 Merchandising & Operating Results of Men's Furnishings In Department Stores With Sales Over \$1 Million (Median Results)

	Total Upstairs Store (143)*	Adult Male Apparel (137)*	Men's Furnishings (117)*	Men's Dress Shirts (31)*	Men's Ties (26)*
Net sales, % change from last year	+ 5.5%	+ 5.6%	+ 5.6%	+ 7.1%	+ 7.8%
Sales, % of merchandise division	--	100.0	49.1	10.6	3.6
Sales, % of total store	89.2	9.0	4.5	1.0	0.3
\$ sales per square foot of selling space (main or largest selling unit)	\$91.6	\$130.5	\$141.4	\$130.7	nr
Cumulative markon, %	48.0%	49.9%	50.0%	48.5%	53.0%
Gross margin, % of sales (incl. cash discounts)	42.2	42.3	45.5	44.1	53.1
Markdowns, % of retail sales	13.2	12.6	9.8	10.6	5.8
Number of stock turns	3.1	2.7	3.1	2.9	3.6
Selling salaries, % of sales (main or largest selling unit)	7.7%	7.1%	6.8%	6.9%	nr
Sales promotion costs, % of sales	3.0	2.9	3.0	4.2	nr

nr = not reported.

*Number in parenthesis refers to the number of reporting stores in each category.

**Men's furnishings include sport shirts, sweaters, vests, dress shirts, hosiery, pajamas, robes and underwear.

Source: National Retail Merchants Association,
1979 Merchandising & Operating Results,
1980 Edition.

RETAIL SALES BY STORE TYPE

Department Stores

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments (Five Year Average*)

<u>Month</u>	<u>Percent of Total Sales</u>
January	4.7%
February	4.7
March	5.1
April	5.6
May	6.5
June	9.7
July	5.8
August	5.3
September	5.9
October	7.3
November	11.5
December	27.9
Five year average	100.0%

*Based on Federal Reserve Board Figures (1961-1965) (Latest available).

Source: Newspaper Bureau of Advertising.

CONSUMER PRICES

The consumer price index for men's furnishings and special clothing (uniforms, etc.) rose 9.3% in 1980 compared to the annual 1979 average. Although this figure was considerably higher than the 4.4% annual increase for all men's wear, it was lower than the over-all increase in the CPI of 12.4%.

Consumer Price Index for Specified Men's Furnishings, 1978-1980 (Index for All Urban Consumers) (December 1977 = 100)

	<u>Annual Averages</u>			<u>% Change</u>	
	<u>1980(p)</u>	<u>1979</u>	<u>1978</u>	<u>1980/ 1979</u>	<u>1980/ 1978</u>
All men's wear	106.0	101.5	99.9	+4.4%	+ 6.1%
Men's furnishings & special clothing	118.4	108.3	101.8	+9.3	+16.3
Men's shirts (dress & sport)	113.7	104.9	100.8	+8.4	+12.8

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics

RETAIL ADVERTISING PATTERNS BY MONTH

Dress Shirt Retail Advertising Percent of Year's Total Newspaper Linage Used Each Month (Five-year Average, 1971-1975)

<u>Month</u>	<u>Dress Shirts</u> <u>1971-1975</u>
January	5.5%
February	6.1
March	8.2
April	7.8
May	7.5
June	13.4
July	5.0
August	6.4
September	6.8
October	8.5
November	10.7
December	14.1
Total lineage	100.0%

Source: The Advertising Checking Bureau, Inc.—
Neustadt Reports Div. (based on retail
newspaper advertising lineage in 7 markets:
Chicago, Philadelphia, Cincinnati, Dallas,
Cleveland, Los Angeles and Washington, D.C.)

CONSUMER BUYING HABITS

The following tables on specified men's furnishings items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles"—with their own households—are not included. The data includes purchases made for men 17 years of age and over.)

Dress Shirts

Percent of Purchases by Type of Outlet, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total dress shirt purchases	100.0%	100.0%
Department stores	30.4	33.7
National chains	24.7	19.9
Discount stores (incl. K mart)	19.8	14.9
Men's specialty stores	17.1	24.3
Other outlets	6.4	7.3
Not reported	1.1	1.5

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total dress shirt purchases	100.0%	100.0%
Less than \$8.00	45.5	24.9
\$8 - \$15.99	42.8	49.9
\$16 - \$23.99	9.8	18.8
\$24 & over	2.0	6.3
Sold at:		
Regular price	35.6	46.7
Sale price	61.0	49.6
Not reported	3.4	3.7

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Dress Shirt</u>													
Units	7.9%	5.4%	6.2%	7.5%	5.9%	9.7%	7.9%	8.0%	5.5%	6.1%	11.6%	18.2%	100.0%
Dollars	7.9	5.1	5.8	7.2	5.5	9.5	6.8	6.8	5.4	6.3	11.9	21.8	100.0

Source for above tables: NPD Research.

CONSUMER BUYING HABITS

Pajamas

According to NPD, more than one-third of all unit and dollar purchases of men's pajamas and other sleepwear (not including robes) made by their panel members were in national chains (Sears, Penneys and Wards) in 1980.

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases of men's pajamas	100.0%	100.0%
Department stores	27.3	32.5
National chains	34.0	34.3
Discount stores, incl. K mart	28.2	22.1
Men's specialty stores	3.4	4.3
Other outlets	6.3	5.9
Not reported	0.7	0.9

Percent of Purchases by Price Point, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases of men's pajamas	100.0%	100.0%
Less than \$5.00	22.5	10.7
\$5 - \$6.99	25.7	20.3
\$7 - \$10.99	38.6	44.7
\$11 & over	13.2	24.4
Sold at:		
Regular price	53.3	59.7
Sale price	43.7	37.2
Not reported	3.0	3.2

Percent of Purchases by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Pajamas</u>													
Units	8.9%	5.2%	3.1%	3.9%	4.4%	9.1%	5.6%	4.6%	3.7%	9.9%	16.7%	24.9%	100.0%
Dollars	8.8	5.3	2.9	3.8	3.9	7.5	4.9	4.2	3.2	10.5	17.4	27.5	100.0

Source for above tables: NPD Research.

CONSUMER BUYING HABITS

Underwear

Discount stores were the favored place of purchase for both undershirts and undershorts, according to the NPD panel information.

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total men's undershirt purchases	100.0%	100.0%
Department stores	17.8	20.6
National chains	27.2	30.0
Discount stores	33.4	27.7
Men's specialty stores	4.8	7.0
Other outlets	16.3	14.2
Not reported	0.6	0.6

Percent of Purchases of Men's Undershirts by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total men's undershirt purchases	100.0%	100.0%
Less than \$1.50	36.5	22.3
\$1.50 - \$1.99	30.2	28.4
\$2.00 - \$3.49	29.5	39.6
\$3.50 & over	3.9	9.5
Sold at:		
Regular price	49.1	57.2
Sale price	45.9	37.8
Not reported	5.0	5.0

Percent of Purchases of Men's Undershirts by Month, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Undershirts</u>													
Units	7.4%	5.3%	8.4%	7.4%	6.6%	9.7%	7.2%	9.7%	6.7%	6.4%	9.8%	15.4%	100.0%
Dollars	6.7	4.7	8.8	7.4	6.6	9.1	6.9	10.1	6.5	6.6	10.4	16.1	100.0

Percent of Purchases of Men's Undershorts by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total men's undershorts purchases	100.0%	100.0%
Department stores	18.0	21.6
National chains	27.2	29.3
Discount stores, incl. K mart	34.9	28.7
Men's specialty stores	4.5	6.7
Sold at:		
Regular price	52.9	60.9
Sale price	43.4	35.2
Not reported	3.7	3.9

CONSUMER BUYING HABITS

Underwear

Percent of Purchases of Men's Undershorts by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Undershorts</u>													
Units	6.5%	4.7%	5.0%	7.6%	7.0%	9.6%	8.5%	11.4%	7.0%	8.3%	10.2%	14.1%	100.0%
Dollars	6.0	4.6	5.2	7.3	6.6	10.3	8.2	10.5	7.0	8.6	10.8	15.0	100.0

Source for above tables: NPD Research.

Hosiery

November and December combined accounted for 32.2% of men's hosiery unit sales and 35.6% of dollar sales of men's hosiery spent by NPD panel members in 1980. Included in men's hosiery sales are sales of athletic socks as well as work socks.

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total men's hosiery purchases	100.0%	100.0%
Department stores	13.5	18.1
National chains	17.2	18.8
Discount stores, incl. K mart	40.5	33.4
Men's specialty stores	6.8	9.1
Other outlets	21.4	20.0
Not reported	0.6	0.6

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total men's hosiery purchases	100.0%	100.0%
Less than \$1.00	58.7	37.6
\$1 - \$1.49	23.4	26.0
\$1.50 - \$2.49	13.4	22.8
\$2.50 & over	4.4	13.6
Sold at:		
Regular price	53.6	61.6
Sale price	43.3	35.3

Percent of Purchases by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Hosiery</u>													
Units	6.0%	5.6%	5.9%	6.3%	7.1%	7.2%	5.4%	9.5%	6.9%	7.7%	12.3%	19.9%	100.0%
Dollars	6.1	4.9	5.4	5.7	6.8	7.0	5.1	9.2	6.6	7.6	13.0	22.6	100.0

Source for above tables: NPD Research.

MEN'S WORK WEAR

GENERAL STATISTICS ON THE INDUSTRY

Market Trends

After reporting increases of 30%-40% in 1979 work wear sales, many manufacturers are predicting record sales for work wear in 1980 despite the downward effect of the recession. Young consumers in the under 25 age bracket contributed mightily to these increased sales. Especially notable was their turn away from denim jeans and toward casual pants, including chinos. This turnabout may enable sales of men's chinos to surpass those of painter's pants, now the largest selling work pants style, in 1980.

Manufacturers' shipments of reported categories of men's work clothing increased 1.3% in value in 1979 to \$863.9 million compared to \$852.6 million in 1978. However, production declined slightly (-0.5%) to 131.3 million units. Men's and boys' work shirts, which have become popular enough to be considered sportswear rather than work wear in some cases, increased 5.8% in shipment value in 1979. The total market is estimated by industry sources at about \$100 million, with career apparel for men accounting for one-third of the total.

In terms of the number of garments, the work clothing (including linen supply garments) market is much larger than the uniform and career apparel markets. A part of the work clothing market is concerned with rental work clothing. Both industrial laundries and linen supply services provide employers with rental garments. Other employers supply work clothing obtained through local retailers, or employees purchase their own.

AT THE MANUFACTURER LEVEL

The latest detailed information on the men's and boys' work clothing industry is contained in the recently released 1977 Census of Manufactures reports issued by the U.S. Bureau of the Census. This is the first complete census conducted since 1972.

In 1977, there were 347 companies which operated 656 establishments in the industry. The value of all shipments (including secondary goods not classified in this industry and miscellaneous receipts) from these establishments amounted to \$3.64 billion in 1977, a 109.5% increase over the 1972 shipment value. The value added by manufacture was 124.9% higher in 1977 than in 1972.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Work Clothing (SIC 2328*)

	1977	1972	% Change 1977/1972
Number of companies	347	297	+ 16.8%
Number of establishments, total**	656	503	+ 30.4
Number with 20 or more employees	575	435	+ 32.2
Employees, total (thous.)	113.7	89.6	+ 26.9
Production workers (thous.)	101.6	80.6	+ 26.0
Payroll (mil. \$)	\$ 719.4	\$ 389.0	+ 84.9
Value added by manufacture# (mil. \$)	\$1,765.4	\$ 784.8	+124.9
Value of shipments## (mil. \$)	\$3,641.9	\$1,738.0	+109.5
Capital expenditures, new (mil. \$)	\$ 44.1	\$ 24.1	+ 83.0

*SIC 2328 comprises establishments primarily engaged in manufacturing men's, youths' and boys' work shirts, pants, jeans, and other work clothing and washable service apparel. As noted above, uniforms and career apparel are not included, as they are primarily produced in the tailored clothing industry. For 1977 the 656 establishments (plants) in the industry included 361 manufacturers, 41 jobbers, 91 independent contractors and 163 multiplant company contractors.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The values of primary products (men's work clothing) alone, of these industries, plus the value of shipments by manufacturers classified in other industries who make suits, etc., as secondary products, are shown on page 46.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977 & 1972.

Employment & Earnings

Employment in the men's and boys' work clothing industry averaged 106.3 thousand in October 1980, a 3.7% increase over October 1979. The number of production workers rose 4.3% over the same time period.

Average weekly earnings for production workers in the industry in October 1980 were \$151.73, 3.7% higher than October 1979 and 20.7% higher than the 1978 average. While both average weekly hours and average overtime hours increased in 1979 over 1978, in October 1980 they were down from the October 1979 average.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment and Earnings in the Work Clothing Industry

	Monthly Averages			Annual Averages		
	Oct. 1980(p)	Oct. 1979	% Change	1979	1978	% Change 1979/1978
Work clothing (SIC 2328*)						
All employees (thous.)	106.3	102.5	+ 3.7%	101.1	97.5	+ 3.7%
Production workers (thous.)	89.3	85.6	+ 4.3	85.2	82.2	+ 3.6
Avg. weekly earnings	\$151.73	\$146.30	+ 3.7	\$142.49	\$125.67	+13.4
Avg. hourly earnings	\$ 4.18	\$ 3.81	+ 9.7	\$ 3.82	\$ 3.53	+ 8.2
Avg. weekly hours	36.3	38.4	- 5.5	37.3	35.6	+ 4.8
Avg. overtime hours	1.1	1.3	-15.4	1.2	0.8	+50.0

(p) = preliminary

*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings, September
and December 1980.

Firms with less than 250 employees were the most prevalent in the work clothing industry in 1977, according to the census of manufactures. They accounted for 77.6% of all manufacturing establishments. However, firms with 250 or more employees were responsible for 62.7% of total shipment value.

Manufacturing Establishments in the Work Clothing Industry By Employment Class Size, 1977

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (thous.)	% of Total	Mil. \$	% of Total
Total (SIC 2328*)	656	100.0%	113.7	100.0%	\$3,641.9	100.0%
By Employment Size:						
Under 50 employees	159	24.2	3.2	2.8	284.9	7.8
50-99 employees	115	17.6	8.5	7.5	217.5	6.0
100-249 employees	235	35.8	39.0	34.3	854.8	23.5
250-499 employees	114	17.4	39.6	34.8	1,118.3	30.7
500 or more employees	33	5.0	23.4	20.6	1,166.4	32.0

*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers In the Work Clothing Industry, 1980 (Median Results)

	Work Clothing (SIC 2328*) (60)**
Current assets to current debt (times)	1.96
Net profits on net sales (percent)	2.59
Profits on net worth (percent)	11.93
Sales to net worth (times)	4.38

*For a definition of this SIC code, see page 40.

**Number in parenthesis refers to the number of reporting companies in the industry.

Source: Dun & Bradstreet,
Key Business Ratios 1980,
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LOCATION OF THE INDUSTRY

Leading States in the Manufacture of Work Clothing

	<u>Establishments</u>		<u>Employees</u>	<u>Value of</u>
	<u>Total</u>	<u>With 20+ Employees</u>	<u>(thous.)</u>	<u>Shipments</u> <u>(Mil. \$)</u>
Work clothing (SIC 2328*)				
U.S., total	656	575	113.7	\$3,641.9
Leading States:				
Texas	78	70	18.3	588.5
Tennessee	74	70	18.7	642.2
Georgia	57	53	10.9	323.1
Mississippi	49	49	13.5	266.6
Alabama	42	39	7.4	139.2
California	39	22	2.5	279.8
Kentucky	35	34	7.0	137.7
Missouri	36	31	5.4	110.3
New York	32	20	0.9	28.6
Total, leading states	442	388	84.6	2,516.0
Percent of U.S. total	67.4%	67.5%	74.4%	69.1%

*For a definition of this SIC code, see page 40.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

PRODUCTION

In addition to the complete census of manufactures compiled every five years, the Census Bureau also issues monthly and annual reports on apparel production (and value of shipments) in the Current Industrial Reports series.

Excluded from the CIR survey are many small firms which are included in the census of manufactures, where data for these firms were obtained from other government agencies. These establishments accounted for 2% of total value of shipments of men's and boys' work clothing in the 1977 census.

Production of reported types of men's & boys' work clothing declined 0.5% in 1979 compared with 1978, according to the 1979 annual CIR. The only category which increased production in 1979 was men's washable service apparel (+19.2%). The largest production decline was in men's coveralls, overalls and jumpsuits category (-7.3%).

Production of Specified Types of Men's Work Clothing, 1977-1979

	Production (thous. units)			% Change 1979/1978
	1979	1978	1977	
Men's work clothing, reported categories, total*	131,292	132,000	na	- 0.5%
Men's & boys' work shirts	43,200	45,000	41,700	- 4.0
Men's & boys' overall & work-type jackets	3,300	3,420	2,112	- 3.5
Washable service apparel	21,288	17,856	16,320	+19.2
Work pants, incl. waistband overalls	44,940	45,969	**	- 1.7
Coveralls, overalls & jumpsuits	18,564	20,028	**	- 7.3

na = not available.

*Includes some boys' work clothing where indicated.

**1977 data is not comparable as dungarees were included in these categories for 1977 but not 1978 and 1979.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel MA-23A.

PRODUCTION

Production of Specified Men's Work Clothing
By Type of Fabric & Construction 1978, 1979

	Percent of Total	
	1979	1978
Work pants, incl. waistband overalls	100.0%	100.0%
By fabric:		
All cotton and chiefly cotton	31.6	36.5
All man-made and chiefly man-made	55.9	46.9
All other fabrics }	12.5	16.6
Fabrics, n.s.k. }		
Coveralls, overalls and jumpsuits	100.0	100.0
By fabric:		
All cotton and chiefly cotton	62.9	64.7
All man-made and chiefly man-made	37.1	35.3
By construction:		
Woven fabric	98.6	72.1
Knit fabric	1.4	27.9
Washable service apparel	100.0	100.0
By fabric:		
All cotton and chiefly cotton	16.6	30.2
All man-made and chiefly man-made	68.5	54.6
All other fabrics	14.9	15.1
By construction:		
Woven fabric	53.8	55.0
Knit fabric	46.2	45.0
Men's & boys' work shirts	100.0	100.0
By fabric:		
All cotton and chiefly cotton	23.6	24.0
All man-made and chiefly man-made	66.9	67.0
All other fabrics }	9.5	9.0
Fabrics, n.s.k. }		
Men's & boys' overall and work-type jackets	100.0	100.0
By fabric:		
All cotton and chiefly cotton	39.3	35.8
All man-made and chiefly man-made	60.7	64.2

n.s.k. = not specified by kind.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Apparel, MA-23A (79-1).

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed In the Production of Work Clothing, 1972, 1977

	<u>Delivered Cost</u> (mil. \$)		% Change 1977/1972
	<u>1977</u>	<u>1972</u>	
Work clothing (SIC 2328*):			
Broad woven fabrics	\$1,194.5	\$521.7	+129.0%
Purchased knitted fabrics	23.8	51.9	- 54.1

*For a definition of this SIC code, see page 40.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

Seasonality in Production

Based on monthly reports of men's work clothing cuttings reported in the Current Industrial Report series (subject to revision), March was the busiest month for cuttings of both men's work pants and work shirts in 1979. The month accounted for 9.5% of total 1979 cuttings of work pants, and 9.8% of 1979 work shirt cuttings.

In 1980, November work pants cuttings totaled 9.6% of production while October accounted for the highest percentage of total work shirt cuttings.

Percent of Cuttings Done By Month of Selected Types of Men's Work Clothing, 1979, 1980

	<u>Men's Work Pants</u>		<u>Men's Work Shirts</u>	
	<u>1980</u>	<u>1979</u>	<u>1980</u>	<u>1979</u>
Total	100.0%	100.0%	100.0%	100.0%
January	7.4	8.7	8.3	8.3
February	7.5	8.6	8.2	8.7
March	7.6	9.5	8.8	9.8
April	8.3	8.6	9.2	8.0
May	7.7	8.9	8.4	9.2
June	8.4	8.7	8.2	8.5
July	7.0	5.2	7.4	6.3
August	9.0	8.2	7.8	8.4
September	9.4	8.5	8.0	8.2
October	9.2	9.1	9.2	9.1
November	9.6	8.4	8.5	8.8
December	8.8	7.6	8.0	6.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's Apparel.

PRODUCTION

Seasonality in Production

At the beginning of 1981, monthly reports in the CIR apparel series for 1979 and 1980 were under revision based on the 1979 annual report. Monthly production figures for 1980 (subject to revision) show a 4.0% decline in men's work pants cuttings and a 2.4% decline in men's work shirt production compared to 1979.

SHIPMENTS

Monthly and annual data on production and value of shipments of men's work clothing is available in the Current Industrial Report (CIR) series issued by the Census Bureau. As previously noted, the CIR is subject to certain limitations and is not directly comparable to findings in the complete census of manufacturers.

According to the 1979 annual apparel CIR, reported categories of men's work clothing registered a 1.3% increase in shipment value over 1978. The biggest increase in value was in the men's washable service apparel classification, up 22.9% in 1979 compared to 1978.

Value of Shipments of Specified Types of Men's Work Clothing, 1978, 1979

	Value of Shipments (million \$)			% Change 1979/1978
	1979	1978	1977	
Men's work clothing, reported categories, total*	\$863.9	\$852.6	na	+ 1.3%
Men's & boys' work shirts	225.3	212.9	\$177.2	+ 5.8
Men's & boys' overall & work-type jackets	33.4	34.3	20.7	- 2.6
Washable service apparel	94.9	77.2	77.3	+22.9
Work pants, incl. waistband overalls	298.4	302.0	**	- 1.2
Coveralls, overalls & jumpsuits	211.9	226.2	**	- 6.3

*Includes some boys' work clothing where indicated.

**1977 data not comparable as dungarees were included in these categories for 1977, but not 1978 and 1979.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Apparel MA-23A (79)-1.

The 1979 annual CIR on gloves and mittens contained quantity and value of shipment information on work gloves and mittens. In that year, the shipment value of this category went up 13.4% over 1978 while the quantity shipped was 5.1% higher. All fabric work gloves and mittens increased 13.2 in value and 6.9% in quantity. All leather work gloves and mittens declined 6.9% in quantity shipped in 1979 compared to 1978, but shipment value rose 14.2%.

SHIPMENTS

Quantity and Value of Shipments of Gloves and Mittens, 1977-1979

	Quantity (thous. doz. pairs)				Value (million \$)			
	1979	1978	1977	% Change 1979/1978	1979	1978	1977	% Change 1979/1978
Work gloves & mittens, total	36,012	34,271	34,052	+ 5.1%	\$452.0	\$398.5	\$370.2	+13.4%
All fabric	30,421	28,446	28,270	+ 6.9	261.4	230.9	222.8	+13.2
Single canton flannel	8,644	8,226	8,533	+ 5.1	na	na	na	
Double canton flannel	5,863	5,699	5,351	+ 2.9	na	na	na	
Fleeced cotton jersey	5,121	4,254	4,096	+20.4	na	na	na	
Circular knit cotton	5,356	5,079	5,309	+ 5.4	na	na	na	
Coated & partially coated fabrics	4,820	4,552	4,319	+ 5.9	na	na	na	
All other fabrics, excl. fabrics, n.s.k.	617	636	662	- 3.0	na	na	na	
All leather	2,188	2,351	2,211	- 6.9	114.5	100.3	85.2	+14.2
All grain, except welders	1,119	1,220	1,191	- 8.3	na	na	na	
All split, except welders	585	644	573	- 9.2	na	na	na	
All other leather, incl. welders	484	487	447	- 0.6	na	na	na	
Leather & fabric combina- tions	1,226	1,384	1,499	-11.4	47.3	41.4	38.6	+14.2
Fabric work gloves & mittens, n.s.k.	2,010	1,900	1,890	+ 5.8	20.2	17.9	16.6	+12.8
Leather work gloves & mittens, n.s.k.	167	190	182	-12.1	8.6	8.0	7.0	+ 7.5

na = not available.

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census
Current Industrial Reports
Gloves and Mittens MA-23D(79)-1.

By Region

Tennessee held a 17.7% share of the \$729.7 million total shipment value (excluding contract work) of men's and boys' work clothing reported in the 1977 Census of Manufactures. Texas was next in total value of shipments with a 17.4% share.

Contract work on men's and boys' work clothing accounted for a total value of shipments of \$411.2 million in 1977. Texas was the leading state in shipments with a 14.5% share.

SHIPMENTS

By Region

Value of Shipments of Work Clothing
By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (million \$)		% Change 1977/1972
	1977	1972	
Work clothing (SIC 2328*)			
United States, total	\$729.7	\$534.8**	+ 36.4%
New England Division:			
Massachusetts	7.5		
Middle Atlantic Division:			
New York	7.1		
Pennsylvania	14.2		
East North Central Division:			
Indiana	48.0		
Illinois	7.4		
West North Central Division:			
Missouri	37.7		
South Atlantic Division:			
Georgia	48.2		
East South Central Division:			
Kentucky	82.4		
Tennessee	129.5		
Alabama	23.5		
Mississippi	44.5		
West South Central Division:			
Arkansas	16.7		
Louisiana	4.6		
Texas	127.1		
Pacific Division:			
California	33.5		
Total, leading states	631.9		
Percent of U.S. total	86.6%		
Contract work on work clothing			
United States, total	\$411.2	\$188.4	+118.3
Middle Atlantic Division:			
Pennsylvania	11.6	14.5	- 20.0
West North Central Division:			
Missouri	24.6	18.7	+ 31.5
South Atlantic Division:			
Maryland	4.1	3.2	+ 28.1
North Carolina	13.3	7.8	+ 70.5
Georgia	26.1	14.4	+ 81.2
Florida	4.5	na	--

(continued)

SHIPMENTS

By Region

Value of Shipments of Work Clothing
By All Producers By Geographic Area, 1972, 1977

	Value of Shipments (million \$)		% Change 1977/1972
	1977	1972	
Contract work on work clothing (continued)			
East South Central Division:			
Kentucky	\$ 20.7	\$ 11.0	+ 88.2%
Tennessee	50.8	31.1	+ 63.3
Alabama	50.6	15.9	+218.2
Mississippi	31.1	9.4	+230.8
West South Central Division:			
Arkansas	4.9	3.7	+ 32.4
Louisiana	4.5	2.7	+ 66.7
Oklahoma	47.1	5.4	+772.2
Texas	59.6	22.3	+167.3
Pacific Division:			
California	4.4	na ^a	--
Total, leading states	357.9	na	--
Percent of U.S. total	87.0%	na	--
Work gloves & mittens			
United States, total	263.0	148.6**	+ 77.0
Middle Atlantic Division:			
New York	2.2		
New Jersey	2.6		
Pennsylvania	7.6		
East North Central Division:			
Indiana	4.8		
Illinois	6.4		
Michigan	3.9		
West North Central Division:			
Missouri	23.0		
South Atlantic Division:			
Virginia	2.8		
North Carolina	51.9		
Georgia	16.1		
East South Central Division:			
Mississippi	36.2		
West South Central Division:			
Texas	5.0		

na = not available

*For a definition of this SIC code, see page 40.

**1972 value of shipments for geographic areas not available.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-I-23A.

PRODUCER PRICES

Preliminary Producer Price Index figures for 1980 show men's work wear rising at a more rapid rate than overall men's wear. For example, men's workpants wholesale prices increased 17.3% over the 1979 average while overall men's apparel increased by 7.7% from their 1979 average.

Producer Prices for Specified Men's Work Clothing, 1978-1980
(1967 = 100 unless otherwise indicated)

	Annual Averages			% Change	
	1980(p)	1979	1978	1980/ 1979	1980/ 1978
All men's apparel	200.3	186.0	176.1	+ 7.7%	+13.7%
Workpants	212.1	180.8	173.4	+17.3	+22.3
Overalls & work-type jackets (Dec. 1977 = 100)	130.1	114.9	106.1	+13.2	+22.6
Work gloves & mittens	267.0	243.4	218.1	+ 9.7	+22.4

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL SALES

The census of retail trade provides the only official data on sales by merchandise line in specific types of stores with payrolls. In the 1977 census, men's career and work wear sales in stores which broke out their sales by merchandise classification amounted to \$989.2 million. Department stores held a 56.5% share of sales in 1977, followed by men's and boys' wear stores and family clothing stores, both with 19.2% shares.

Reported Sales of Men's Career/Work Wear By Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Sales		Sales	
	Number*	Percent	Mil. \$	Percent
Total**	22,570	100.0%	\$989.2	100.0%
Department stores***	5,924	26.2	559.2	56.5
Men's & boys' wear stores	5,442	24.1	190.4	19.2
Family clothing stores	7,573	33.5	189.8	19.2
Other (men's shoe stores & mail order houses)	3,640	16.2	49.8	5.1

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Total is based only on stores which reported sales of career/work wear. Not all store types broke out sales for this category. The above reflects sales in major outlet types.

***Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

Almost 10% of men's and boys' wear sales in mail order houses in 1977 came from the men's career/work wear category, the highest sales share of any store type where volume was classified by merchandise line. Men's career/work wear accounted for 6.3% of men's and boys' wear sales in family clothing stores.

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Career/Work Wear in Specified Store Types, 1977

	Men's & Boys' Wear Sales* (million \$)	% of Sales Accounted For By Men's Career/Work Wear
Department stores**	\$10,574.9	5.3%
Men's & boys' wear stores	6,275.4	3.0
Family clothing stores	3,001.5	6.3

*Excludes men's & boys' footwear sales.

**Includes discount department stores as well as traditional department stores. See footnote in table above.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade RC77-L.

CONSUMER BUYING HABITS

Information on men's work shirts and work pants has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles"—with their own households—are not included. The data includes purchases made for men 17 years of age and over.)

Percent of Purchases by Store Type, 1980

	<u>Work Shirts</u>		<u>Work Pants</u>	
	<u>% of Units</u>	<u>% of Dollars</u>	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%	100.0%	100.0%
Department stores	10.7	12.7	8.1	7.7
National chains	50.0	51.7	55.1	52.6
Discount stores, incl. K mart	25.6	20.9	20.1	19.3
Men's specialty store	4.6	6.6	8.1	10.7
Other outlets	8.5	7.5	8.3	9.3
Not reported	0.4	0.6	0.4	0.5

Percent of Purchases by Price Points, 1980

	<u>Work Shirts</u>	
	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$5.00	26.6	12.8
\$5 - \$8.99	48.7	45.2
\$9 - \$12.99	17.1	25.3
\$13 & over	7.8	16.6
Sold at:		
Regular price	42.4	49.9
Sale price	53.2	45.9
Not reported	4.4	4.2

	<u>Work Pants</u>	
	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$8.00	17.3	8.1
\$8 - \$13.99	53.5	46.2
\$14 - \$19.99	21.5	29.0
\$20 & over	7.7	16.7
Sold at:		
Regular price	61.3	64.5
Sale price	35.3	31.5
Not reported	3.4	4.0

CONSUMER BUYING HABITS

Percent of Purchases by Months, 1980

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
<u>Work shirts</u>													
Units	6.3%	5.4%	2.6%	3.7%	4.3%	6.2%	5.0%	4.4%	7.6%	15.7%	17.6%	21.3%	100.0%
Dollars	6.0	4.8	2.5	3.1	4.0	6.4	3.9	4.1	7.0	16.5	17.6	24.1	100.0
<u>Work pants</u>													
Units	6.5	6.3	5.8	7.2	5.8	9.8	7.2	8.3	10.6	7.9	9.9	14.9	100.0
Dollars	6.2	6.0	6.2	5.9	5.1	8.0	6.6	7.5	10.6	7.7	12.4	17.8	100.0

Source for above tables: NPD Research.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store type.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. (\$15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, \$20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of \$50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S)(April) : Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR (May): Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, \$15.00)

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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